

PROCURE ARIZONA FEATURES FOR JULY 2015

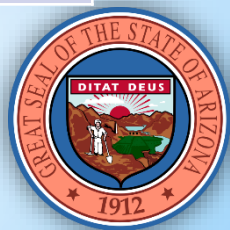


September, 2014

PROCUREAZ: GOING FROM v11 TO v12.5

- There are six software releases the State is implementing
 - All have been system tested
 - Incorporated in ProcureAZ training content for 2015
 - Included in the scripts to be provided to Agencies for UAT

<u>NO</u> Agency configuration of ProcureAZ needed to use.	Agency configuration of ProcureAZ required to use
9 Features	5 Features



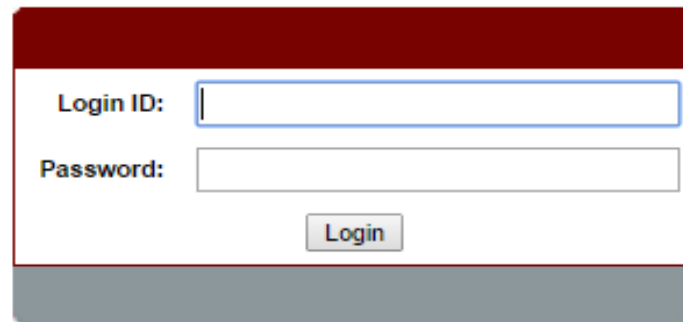
NO AGENCY CONFIGURATION REQUIRED TO USE FEATURE

Improved Error Message when Logging in (BSPD-8892)

In the previous version, when a user enters a wrong login ID and password combination, the system will bring the user to the screen for password reset. The change is now when the user the login ID or password is invalid, the system brings the user to the screen to try to log-in again - not reset password.

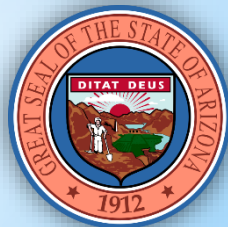
Validation Errors

- The Login ID and Password you entered does not match our records. Please try again or contact your administrator.



A screenshot of a login interface. It features a dark red header bar. Below it, there are two input fields: 'Login ID:' and 'Password:'. The 'Login ID' field has a blue border, while the 'Password' field has a grey border. A 'Login' button is positioned below the password field. The entire form is set against a light grey background.

[Login Assistance?](#)



NO AGENCY CONFIGURATION REQUIRED TO USE FEATURE

Login/Password Retrieval (BSPD-10825)

Users can now request that the username associated with a given email address be sent to that email address.

Forgotten User ID

Login Help

What type of Login assistance do you require?

☒ Forgot User ID ☐ Forgot Password

For forgotten User ID requests, please enter your email address below.

Email Address:

Forgotten Password

Login Help

What type of Login assistance do you require?

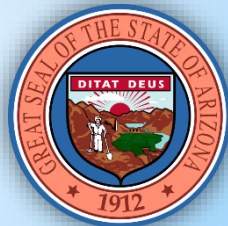
☐ Forgot User ID ☒ Forgot Password

For forgotten Password requests, please enter your Login ID and Email Address below.

Login ID:

Email Address:

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NO AGENCY CONFIGURATION REQUIRED TO USE FEATURE

Security (BSPD-2914)

Provided ability for administrator (Internal & Org) to terminate active sessions for a user by setting the user account to inactive.

User Profile Maintenance for: Annette Besemer

User Profile

Salutation: Alternate ID:

First Name*: Last Name*:

Phone*: -

Mobile Phone:

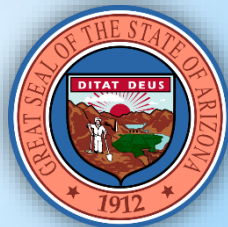
Email*:

Proxy User: ☐ Activate Proxy User

Job Title*:

Login ID*: Status*:

Password*: Verify Password*:



NO AGENCY CONFIGURATION REQUIRED TO USE FEATURE

Security (BSPD-6706)

Organization administrators are able to change the status of a user account to kick the user out of the system and prevent him or her from logging back into the system. Status is "Locked" Yes, changing the user's status back to Active will allow them to log in again.

User Profile Maintenance for: Annette Besemer

User Profile

Salutation: Alternate ID:

First Name*: Last Name*:

Phone*: -

Mobile Phone:

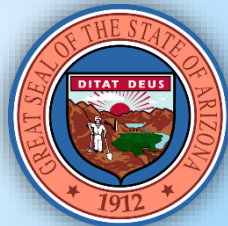
Email*:

Proxy User: ☐ Activate Proxy User

Job Title*:

Login ID*: Status*:

Password*: Verify Password*:



NO AGENCY CONFIGURATION REQUIRED TO USE FEATURE

Purchasing (BSPD-4852)

Added a P-Card Desired indicator to the Requisition Informal Bid process. This indicator will allow the end-user to set this new field and indicate to participating vendors that the Agency desires using a P-Card to purchase the good or service.

New Requisition


General | Items | Address | Accounting | Routing | Attachments | Notes | Reminders | Summary

Requisition Number:

Status: 1RI - Requisition In Progress (When User request is created)

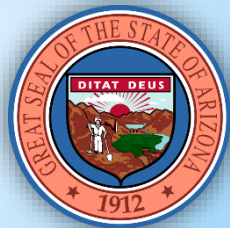
Department*: ADSPO - State Procurement Office ▼

Location*: SPO - State Procurement Office ▼

Required By Date: 

Requisition Type : ▼

P-Card Desired: ☐



NO AGENCY CONFIGURATION REQUIRED TO USE FEATURE

Purchasing (BSPD-4872)

Added the ability to select and add vendor quote attachments to the requisition during the informal bid process..

<https://23.253.164.99/bsq/quotes/informalQuoteTabulation.sdo?external=true&docId=ADSP015-00031377&...>

Informal Quote Tabulation - Requisition ADSP015-00031377

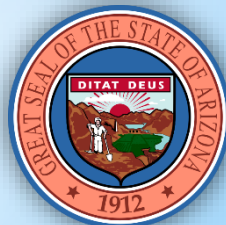
of Items per page: 25 Sort by: Print Sequence Ascending

of Vendors per page: 5 Sort by: Vendor Name Ascending

Total Item Count: 1 Informal Quote Bidder Count: 1

Req Item Info	000003137 - ProcureAZ Help ...
Item #: 1 Print Sequence: 1.0 (050 - 60) ,kdpSFDJPSDFJSF/P Quantity(UOM) : 30.00(EA) Unit Cost: \$400.00	<input type="checkbox"/> ** \$3,000.00 30.0 (EA) 0.0 (Tax) 0.0 (Freight) Subtotal: \$90,000.00
Quote Total	\$90,000.00
Apply All Quote Item Pricing to Req Items	<input type="button" value="Apply Pricing"/>

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NO AGENCY CONFIGURATION REQUIRED TO USE FEATURE

Purchasing (BSPD-4851)

Added the capability to send custom vendor notifications from the Requisition during the informal quote process. This feature allows for individual vendor selection in addition to including attachment links in the email.

Open Market Requisition ADSP015-00031377

General Items **Vendors** Address Accounting Routing Attachments Notes Reminders Summary

Send Informal Quote Email

Vendor Recipients: Abrasives & Equipment of Arizona, Inc.; ProcureAZ Help Desk1

Additional Email Recipients:

From: John Nielsen (john.nielsen@azdoa.gov)

Subject*: Vendor Notification - Req # ADSP015-00031377, bhafkpsaeje

Text*:
An informal quote request has been sent to you by State Procurement Office.
To respond, you need your company's user name and login ID. Go to the State Procurement Office site at <https://23.253.164.99/bso/login.sdo>. Enter your login and password information to sign into the system. Once logged in, click Quotes, and then click on the Informal Quotes link.
The information from the request is below:
REQUISITION HEADER
Requesting Department: ADSP0 - State Procurement Office
Buyer Name: John Nielsen
Buyer Phone: (602)542-5511
Buyer Email: john.nielsen@azdoa.gov

Attachments

No Attachments

File: No file chosen


Description:

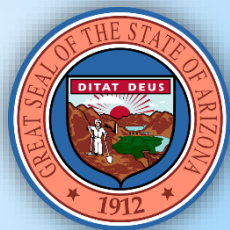


NO AGENCY CONFIGURATION REQUIRED TO USE FEATURE

Credit Memo - adding Vendor Credit Memo Number (BSPD-6206)

Credit Memos have been enhanced to allow for credit memos to be sent to financial systems as a separate document. Provides credit memos with an independent identifier within the system for tracking the vendor's credit memo number, and showing how a credit has been applied. Credit memo will be sent to new AFIS as a separate line item on the invoice with negative amount, vendor credit memo number, and a unique event type.

Credit Memo General	
General	Items Vendor Address Accounting Routing Attachments Notes Reminders Summary
Credit Memo	
Credit Memo Number:	
Vendor Credit Memo Number: *	<input type="text"/>
Description: *	<input type="text"/>
Vendor: *	<input type="text"/> 
Department: *	<input type="text"/>
Credit Memo Status:	
Alternate Id:	
Credit Memo Date: *	
Credit Memo Owner:	
Location: *	



NO AGENCY CONFIGURATION REQUIRED TO USE FEATURE

Accounts Payable BSPD-12516

When a Credit Memo is associated with a Purchase Order or Release, users can apply the Credit Memo directly to specific line items from that Purchase Order or Release.


General | Items | Vendor | Address | Accounting | Routing | Attachments | Notes | Reminders

Credit Memo


Credit Memo Number:

Vendor Credit Memo Number: * 0987654321

Description: * test

Vendor: * 000022339 - TEST VENDOR JAKE 2 

Department: *

Purchase Order Number: AD SPO15-016200:0 

Credit Memo CM0000000261

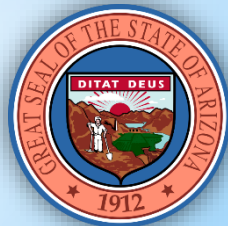
General | **Items** | Vendor | Address | Accounting | Routing | Attachments | Notes | Reminders | Summary

General | Accounting | Notes

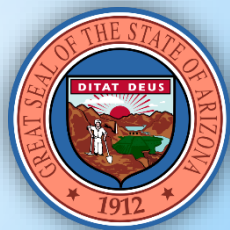
Item #	PO Item #	Item Description *	Reason *	Quantity *	Unit Cost *	Tax Rate	Tax Amount	UOM *	Total	Delete
1	1	Temporary Staffing: Receiv	Faulty Materials ▼	1	50.00	▼	0.00	HR ▼	0.00	<input type="checkbox"/>
2	2	Temporary Staffing: Receiv	Invoice Incorrect ▼	3	50.00	▼	0.00	HR ▼	0.00	<input type="checkbox"/>

Add Items from PO | Save & Exit | Save & Continue | Reset | Cancel & Exit

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AGENCY CONFIGURATION REQUIRED TO USE THE FOLLOWING FEATURES



AGENCY CONFIGURATION REQUIRED TO USE FEATURE

Change Orders - Non-Dollar Approval Support (BSPD-4207)

Provides Admins an option to trigger approval paths for all change orders for system documents so that the system automatically routes those changes through approvals, as required by agency practices.

Approval Path AATA - Auto Theft Authority

General	Change Order	Misc/Freight	Department/Location	Email	NIGP Code	Account Segment	Vendor	Summary
---------	--------------	--------------	---------------------	-------	-----------	-----------------	--------	---------

Apply approval path for all changes to document ☒

Dollar Increase: The value entered should be a dollar(\$) amount. This value will identify the dollar amount change from the original PO that triggers this approval path.

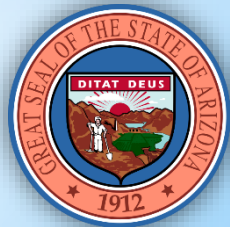
Dollar Increase (\$) ^{*}:

Cumulative: ☐

Percent Increase: The value entered should be a percentage (%). This value will identify the percent change from the original PO that triggers this approval path.

Percentage Increase (%) ^{*}:

Cumulative: ☐



AGENCY CONFIGURATION REQUIRED TO USE FEATURE

Approver - Add an Approver to DA role, but not be able to purchase (BSPD-7959)

Enhanced Department Access role to enable user to be an approver without being a Requisitioner or Contract Shopper.

Leave Blank

☒ Department Access

Department Access Role Privilege Type:
(A department/location superuser must be a requisitioner)

If Department Access user, set up this user as

☒ User is an Approver

☐ Allow PO Receipts for Department Access Role

☐ Enable Change Order Creation

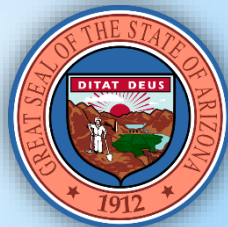
☐ Department Buyer Enabled

☐ Allow Requisition Item Import

☐ Disallow Ad-Hoc Reporting

☐ Allow Two Way Match

☐ Inquiry



AGENCY CONFIGURATION REQUIRED TO USE FEATURE

Parallel Approval Paths (BSPD-7040)

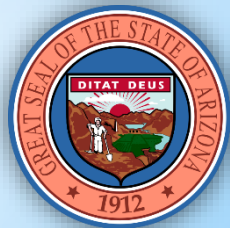
Enhancements have been made to approval paths to allow for: Multiple reviewers can receive notification and approve documents simultaneously. The previous functionality allowed only for a serialized approach to approvals. Groups of approvers can now be assigned to approve, where only one approver within the group must approve.

Parallel: Multiple Approvers in any order - All must approve

Approvers		
Delete	Level	Approver
<input type="checkbox"/>	<input type="text"/>	<input type="text"/> ▼
<input type="checkbox"/>	10	Nielsen, John ▼
<input type="checkbox"/>	10	Jacobsen, Eric ▼
<input type="checkbox"/>	10	Dwight, Greg ▼

Groups: Just one approval required

Approvers			
Delete	Level	Approver	Alternate
<input type="checkbox"/>	<input type="text"/>	<input type="text"/> ▼	<input type="text"/> ▼
<input type="checkbox"/>	10	Nielsen, John ▼	Jacobsen, Eric ▼
			Dwight, Greg ▼
			<input type="text"/> ▼



AGENCY CONFIGURATION REQUIRED TO USE FEATURE

Workflow Escalation (BSPD-5908)

Provided ability to require a user to acknowledge a system message. This utility enables approval paths to be configured to send reminder emails if a document in that approval path is not approved within a specified number of days, and keeps sending emails at that interval to the approver until action is taken.

Approval Path ACTSEC - Ag Consultation and Training Section

General | Change Order | Misc/Freight | Department/Location | **Email** | NIGP Code | Account Segment | Vendor | Summary

Format email to be sent to the approvers for this path

☒ Send Email

☐ Resend Email After Days if Not Approved or Returned

☐ Customize Email Content

To

CC

BCC

Next Approver

User ID	User Name	Email	Delete
new: <input type="text"/>			
new: <input type="text"/>			

User ID	User Name	Email	Delete
new: <input type="text"/>			
new: <input type="text"/>			

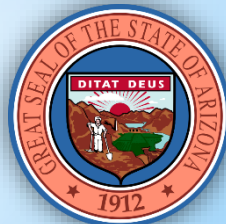
Subject*

Append Doc ID

Email Message*

Append Standard Text

Append Doc ID



AGENCY CONFIGURATION REQUIRED TO USE FEATURE

User Maintenance

Two-Way Match (BSPD-5911)

Support for matching between the purchase order to enable creation of invoice, if enabled on REQ/PO document. Settings has to be set on User profile for DA or BP to select 2-way match. IF 2-way match is selected on REQ/PO, invoice can be created and approved without a separate receipt document (permit to pay is set equal to PO).

Role Maintenance for: John Nielsen

Roles*

☐ Vendor Administrator

☒ Basic Purchasing ☐ Can Open Formal Bids ☒ Can Create Demand Requisition ☐ BP Supervisor ☒ Allow Requisition Item Import ☒ Allow Contract Import ☐ Disallow Ad-Hoc Reporting ☒ Allow Two Way Match

☐ Internal Administrator

☒ Department Access

Department Access Role Privilege Type: (A department/location superuser must be a requisitioner)

If Department Access user, set up this user as

☒ User is an Approver ☐ Disallow Ad-Hoc Reporting

☒ Allow PO Receipts for Department Access Role ☒ Allow Two Way Match

New Requisition

New Requisition

General Items Address Accounting Routing Attachments Notes Reminders Summary

Requisition Number:

Status: 1RI - Requisition In Progress (When User request is created)

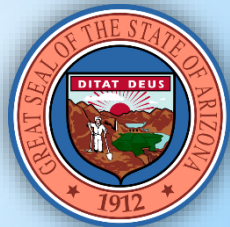
Department*: ADSPD - State Procurement Office

Location*: SPO - State Procurement Office

Required By Date:

Requisition Type:

Invoice Method:



AGENCY CONFIGURATION REQUIRED TO USE FEATURE

Two-Way Match (continued) (BSPD-5911)

Support for matching between the purchase order to enable creation of invoice, if enabled on REQ/PO document. Settings has to be set on User profile for DA or BP to select 2-way match. IF 2-way match is selected on REQ/PO, invoice can be created and approved without a separate receipt document (permit to pay is set equal to PO).

New Invoice

New Invoice

General Items Credits Subcontractors Accounts Routing Attachments Notes Reminder Change Order Summary

Confirmation Messages

- Changes saved successfully.

Invoice number*:

Invoice Type: **2 way matching**

Invoice Date *(MM/DD/YYYY):

Invoice Status:

Invoice Description:

Effective Date *(MM/DD/YYYY):

Permit to Pay Amount

Invoice #: 123456789 Vendor #: 000007314 Vendor Group #: 01

General **Items** Credits Subcontractors Accounts Routing Attachments Notes Reminder Change Order Summary [Back to PO](#)

Item General Validation Errors

- You must pay at least one item (invoice amount != 0).

Invoice Item #/ PO Item #	Item Description false				
	PO Item Status	PO Item Amount	Previous Invoice Amount	Permit To Pay	Invoice Amount
1	Fire Extinguishers				
	3PS - Sent	\$259.92	\$0.00	\$259.92	0.00

